

**Promotor(a)/Community Health Worker (CHW) Training and Certification  
Advisory Committee Minutes**

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**Meeting date|time** March 27, 2015 10:00 AM | **Meeting location** DSHS Central Office (Austin) -Conference Call and Webinar

**Meeting called by:** Mérida Escobar, Presiding Officer

**Members present:** Mérida Escobar; Oscar Muñoz, MPA; Richard Rosing; Julie St. John, MPH, Dr.P.H.; Venus Ginés, M.A.; Bobby Hansford; Gary Eagleton

**DSHS Staff present:** Beatrice Smith, Caly Fernández, Monica Maldonado, Francis Ibezim, Beverly MacCarty

**DSHS Staff on the phone:** Evelyn Delgado (Central Office); Taiya Jones-Castillo (HSR 1); Debbie Correa, Jane Schwarz, Susan Senn, Patti Shearin (HSR 2/3); Jennifer Montgomery, Deborah Warren (HSR 4/5N); Joseph Ramsey (HSR 6/5S); Dulce Camacho HSR 8; Mona Izquierdo (HSR 9/10)

**Guests on the phone:** Valerie Andrade, Texas A&M Colonias Program; Angelena Baines; Cheryl Barmasse, Episcopal Health Foundation; Rodney Black, Valley High School; Christian Burgos, Parkland Health; Alfonso Carlon, Cardea; Adriana Castaneda, University of Texas Health Science Center; Irene Dragustinovich, UT Physicians; Michelle Duerr, Delphine Scott, TMF Quality Institute; Rose Dunaway, Girling Community Care; Carl Dyer, Trinity County; Enedina Felix, Northeast Public Health District; Orfelinda Fox, Molina Healthcare; Rose Garcia; Sylvia Gonzales, Centromed; Maria Gonzalez, Health and Human Services Commission; Rosalia Guerrero – University of Texas School of Public Health – Houston; Pamela Jolivet, Legacy Community Health Services; Marshall Kratz, Texas Area Health Center (AHEC) East – Northeast Region; Norma Lee, Esperanza; Martha Maldonado, Dallas Healthy Start; Javier Mejia, South Texas Preparatory Academy; Katie Nimmons, Texas A&M Health Science Center; Tiffany Ross, Mental Health America of Greater Houston; Ivonne Salinas, Centene; Lucy Trivino; Esmeralda Vera, Seton Health Plan; Jerry Wilson, City of Austin

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## **AGENDA TOPICS**

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**Agenda topic Approval of Minutes: | Presenter Mérida Escobar, Presiding Officer**

**Discussion:** Venus Ginés requested an amendment to the January 30, 2015 minutes to add additional recommendations from the Training and Workforce Development Workgroup under the 2015 CHW Advisory Committee Workplan section. The minutes will be amended to include recommendations to extend the CHW renewal period from two to three years and to allow guest speakers at DSHS-certified training programs for CHWs/CHW instructors as part of the certified training if their presentation is less than 30 minutes. Julie St. John moved to approve the minutes as amended. Venus Ginés seconded the amended motion. Motion passed unanimously.

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**Agenda topic Public Comment | Presenter Mérida Escobar, Presiding Officer**

**Discussion:**

Tiffany Ross, Mental Health America – Greater Houston, shared that the organization participated in the development of two training modules that have been approved by DSHS.

Rosalia Guerrero-Luera, University of Texas School of Public Health – Houston, noted that the UTSPH training program was recently renewed for another two years.

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**Agenda topic 2014 Annual Report – Promotor(a) or CHW Training and Certification Advisory Committee | Presenter Beverly MacCarty, DSHS**

**Discussion:**

The 2014 Annual Report of the Promotor(a) or Community Health Worker (CHW) Training and Certification Advisory Committee is prepared in accordance with Texas Administrative Code, Title 25, Part 1, Chapter 146. The Annual Report provides information on the Advisory Committee, including membership, attendance, accomplishments in 2014, and planned activities for 2015. The Annual Report also provides process evaluation data related to certification and renewal rates and trends, curricula, and initial certification and continuing education courses. This data provides useful information in identifying trends, program areas of strength, and potential opportunities to improve training and certification of CHWs in Texas.

Beverly MacCarty shared highlights from the 2014 Annual Report and noted that the report is currently in the approval process and, once approved, will be posted to the webs

<http://www.dshs.state.tx.us/mch/chw/workforce.aspx>.

*Certified CHWs in Texas* - The number of certified CHWs in Texas continues to increase steadily. As of December 31, 2014, there were 3,113 certified CHWs, an increase of 16 percent from 2013. Over 1,100 CHWs were newly certified during 2014. Most certified CHWs in Texas are female (87 percent), however, the percentage of male CHWs has increased to 13 percent. Certified CHWs in Texas are racially and ethnically diverse; Hispanic - 62 percent, Black -25 percent, White -10 percent, Asian – 2 percent, Other – 1 percent, and Native American – less than 1 percent. Most CHWs report full or part time paid work (73 percent), however, data also includes employment other than as a CHW or promotor(a).

*CHW Renewal* - CHWs must complete at least 20 hours of continuing education every two years to renew their certificates, including at least ten DSHS-certified contact hours. Renewal rates demonstrated a steady increase from 2008 to 2011, however decreased beginning in 2012. Over 690 CHWs did not renew their certification during 2014. A CHW/Promotor(a) Survey will be implemented in 2015 to gather information regarding CHWs' perspectives regarding the value and benefits of certification and reasons for renewing or not renewing certification. Survey results may assist the program in developing additional strategies to improve renewal rates.

*CHW Instructor Certification and Renewal* - As of December 31, 2014, Texas had 237 certified instructors, including 66 that were newly certified during the year. Over 20 instructors did not renew their instructor certification during 2014.

*CHW Training Programs* -The number of training programs has increased over the past several years, expanding the availability of certification training courses and continuing education opportunities for CHWs. As of December 31, 2014, there were 30 training programs approved to provide both certification training courses and continuing education for community health workers. An additional eight training programs were approved to provide only continuing education for CHWs. Training programs graduated 517 CHWs and 17 instructors and provided over 200 CHW continuing education opportunities and 21 CHW instructor continuing education opportunities in 2014. Training occurred in 24 counties and through distance learning.

*Questions*

Venus Ginés requested information on the current process to remind CHWs when their certification renewal is due. DSHS currently sends CHWs a reminder in the CHW's preferred language six months prior to expiration, via email or by mail if no valid email address. The reminder includes the following information:

- Continuing education requirements
- Links to training program information

- Links to online modules
- Link to, or a copy of the renewal application (If mailed)
- Extension information
- DSHS staff contact information if additional questions.

DSHS staff also contact CHWs again by phone before expiration to see if they have any questions about continuing education or renewing their certification. Following expiration, DSHS mails CHWs letters noting that their certification has expired and provides information regarding how to renew the expired certification.

Mérida Escobar asked if training programs could receive information related to CHWs with expired certifications who completed a training program. Beverly MacCarty noted that this information could be provided through an Open Records Request to [chw@dshs.state.tx.us](mailto:chw@dshs.state.tx.us). Julie St. John noted that training centers might be able to help with reminders to CHWs regarding the need to renew to maintain certification and offered to discuss this with the training programs she works with.

Rich Rosing asked about the demographics of Native American certified CHWs in Texas. Less than 1% of certified CHWs in Texas indicated that they are Native American. Oscar Muñoz noted opportunities to meet with representatives of the Tigua and Kickapoo tribes and that he will share information about CHW certification in his meetings with the tribes.

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## **Agenda topic 2015 CHW Advisory Committee Workgroups | Presenter Mérida Escobar, Presiding Officer**

### **Discussion:**

The Committee finalized their 2015 Workplan at the January 30, 2015 meeting. Committee members reviewed roles and responsibilities and identified a Committee member as a lead for each workgroup.

#### *Workgroup Responsibilities*

- Each workgroup will consist of a minimum of two or three members and will identify an Advisory Committee member to serve as the workgroup lead/chair.
- Each workgroup can include Advisory Committee members, state office staff, CHWs, CHW instructors, CHW stakeholders etc.
- Each workgroup will define objectives/focus, timelines, and ways to measure success.

#### *Workgroup Lead Roles*

- The lead for each workgroup is responsible for maintaining a list of members, setting a meeting schedule, preparing agendas and providing notes to record discussions and actions.
- The lead will report progress and bring questions or recommendations to the full Committee at regularly scheduled Advisory Committee meetings.

#### *Workgroup Member Roles*

- Workgroup members should be prepared to participate in scheduled workgroup meetings, contribute to discussions, follow-through on any tasks assigned by the workgroup, and report back to the workgroup. Each member's expertise, whether a skill or knowledge, contributes to the workgroup's success.

#### *DSHS Staff Roles*

- One - three DSHS staff members will help support each workgroup:
- Provide resources or history when needed.
- Arrange for conference call meetings and send meeting invitations at workgroup lead/chairs' requests.

#### *Program Rules Workgroup*

Lead: Merida Escobar

Members: Claudia Bustos

DSHS staff support: Beverly MacCarty, Francis Ibezim, Monica Maldonado

#### *Communication and Outreach Workgroup*

Lead: Julie St. John

Members: Claudia Bustos, Rich Rosing, Gary Eagleton, Leticia Guerrero, Oscar Munoz, Jean Diebolt, Bobby Hansford

DSHS staff support: Beverly MacCarty, Monica Maldonado

#### *Training and Workforce Development Workgroup*

Lead: Venus Gines

Members: Merida Escobar, Claudia Bustos, Julie St. John, Leslie Hargrove, Lee Rosenthal

DSHS staff support: Beatrice Smith, Caly Fernández, Francis Ibezim

#### *Certification/Employment Opportunities Workgroup*

Lead: Gary Eagleton

Members: Claudia Bustos, Julie St. John, Leslie Hargrove, Lee Rosenthal

DSHS staff support: Beatrice Smith, Caly Fernández, Francis Ibezim

#### *Next Steps:*

Workgroup leads will identify dates/times to plan future meetings. DSHS staff will assist in arranging conference calls based on dates selected by workgroups.

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**Agenda topic CHW Spotlight: DSHS CHW Regional Meeting – Fredericksburg February 11, 2015; CHW “Dolls” | Presenters: Taiya Jones-Castillo, Jolie Person, Patti Shearin, Deb Warren, Joseph Ramsey, Caly Fernández, Mona Izquierdo, Beatrice Smith**

#### **Discussion:**

DSHS staff in the regions and in Central Office collaborated to plan and implement training for DSHS regional staff to support the utilization of CHWs in maternal and child health services and programs. Beatrice Smith shared that the training included 80 participants from the eight Health Service Regions across Texas. Staff presented an interactive Jeopardy session, overview of CHW certification, and a panel presentation discussing CHWs in maternal and child health programs. Regional staff developed a CHW “doll” based on attributes/qualities of CHWs, CHW activities, and planned activities.

HSR 1: Taiya Jones-Castillo and Jolie Person described the HSR 1 CHW “doll”, including how the doll incorporated the unique aspects of the region: wind farms, cotton fields, bigger skies, and cowboy boots. The “doll” has a big heart because community health workers have a heart for service and have a desire to give back to the community. CHWs are natural helpers, those people that you can really come to with your concerns. CHWs are encompassed in each maternal and child health measure, including motor vehicle injury prevention, suicide prevention, infant mortality prevention, child injury and death prevention, teen pregnancy prevention, and obesity prevention. CHWs are supported with materials, training, and collaboration.

HSR 2/3: Patti Shearin shared that the training was a first introduction to CHWs, so in developing their CHW “doll”, her group built their vision based on the CHW competencies and skills. Their CHW “doll” wears overalls to represent that she works in rural communities and her cowboy boots represent the western culture of the communities that she serves. She is forward thinking and always reassessing and re-evaluating the needs of her community and how she can best meet those needs. The “doll’s” pink hair demonstrates that she’s willing to be different and think out of the box and try to find creative solutions, is very versatile, and has a huge heart that is open and filled with the caring of the people of her community.

She also carries with her a Rubik's cube to demonstrate her ability to problem solve. The doll has a cactus in her pocket as her reminder that when you get stuck, you can find yourself clear of the thorns by problem solving and being open to new ideas. And lastly, her arms are bare because she's always ready to roll up her sleeves and get down to work and to do whatever's necessary to get the job done.

HSR 4/5N: Deb Warren presented the CHW “doll” for the region. The “doll” depicts health concerns and conditions in the regions (raining cats and dogs) and partnerships. The CHWs are holding up the umbrella and they have their rain boots on to help with all the conditions impacting communities in the region. Strengths include boots on the ground; being familiar with resources and assisting in advocating for the health of communities. Paw prints near the “doll’s” heart represent that CHWs leave their prints on us as they are working out in the community to offer both resources and advocacy to the community to improve the health of individuals and communities. Outcomes include improved clinical setting outcomes and, ultimately, improved health rankings.

HSR 6/5S: Joseph Ramsey presented the CHW “dolls” developed by the group. The group created a male CHW (Albert) and a female CHW (Eva), both with big hearts. The “dolls” included key words representing CHW qualities: equity, performing, support, initiative, responsibility, active, discover bright ideas, oral health, vaccinations, and public health. CHWs are essential to the health initiatives implemented in diverse communities. CHWs work in their own communities and know the health risks and population.

HSR 7 – Caly Fernandez shared the CHW “doll” developed by the region. Staff created a CHW “doll” that would embody the whole person’s health and well-being. CHWs embody the whole person health and wellbeing. CHWs in Region 7 educate all persons and communities on the importance of physical health, dental health, nutritional and mental health, and do prevention of domestic and family violence and child safety advocacy. CHWs connect people in the community to services and resources that are available.

*Next steps:*

DSHS Central Office staff will continue to work with regions to identify opportunities to incorporate CHWs in Title V population-based services.

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**Agenda topic Program Update | Presenter Monica Maldonado, Beatrice Smith, Beverly MacCarty**

#### **Discussion: Program Update**

As of March 1, 2015, there were approximately **3,200** certified community health workers and **246** certified instructors.

*% of on-time CHW renewals for January and February 2015*

- January 2015 – 45%
- February 2015 – 42%

*# of CHW and Instructor Applications Received includes (initial, re-application, renewal applications)*

- January 2015 – 157
- February 2015 – 142

*Presentation – Migrant Women’s Conference* - Beatrice Smith participated in a presentation at the Migrant Women’s Conference in Austin on March 5, 2015 to discuss the involvement of CHWs making a difference in preventing violence against women. She noted that DSHS certified training programs are key partners in providing information and resources about domestic violence for CHWs. Migrant Clinicians Network also provides training for CHWs involved in outreach to men in migrant communities.

*Questions*

Committee members expressed interest in learning more about domestic and sexual violence among teens and on campuses.



*CHW Evaluation Survey Implementation Status* - The online CHW Evaluation Survey has been developed in English and Spanish and is currently being field tested. Several advisory committee members have participated in the field test that and Beatrice Smith is connecting with community health workers and instructors or training programs to also help field test the survey. A paper copy of the survey will also be available as well as postage-paid return envelopes. DSHS is finalizing the communication letter and email and will send out email and mailed communication to CHWs who have renewal dates in 2015 to invite them to complete the survey.

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**Agenda topic CHW Training and Certification Program Proposed Rules| Presenter Beverly MacCarty**

**Discussion:** DSHS completed the 4-year review of the CHW Training and Certification Program rules, including gathering feedback from CHWs, Advisory Committee members, instructors, training programs, and other stakeholders through meetings and an online survey with over 700 responses. DSHS developed proposed rules based on feedback from stakeholders. The proposed rules were published in the Texas Register on February 27, 2015. Individuals and organizations may provide public comment on the proposed rules through March 30, 2015. The proposed rules restructure rule sections from twelve to eight sections to increase clarity and flow of the rules. The proposed rules include new requirements for training programs, including a hands-on learning component within a CHW certification course. Stakeholder feedback recommended developing specific criteria to allow training programs to include guest instructors (non-certified instructors) in the provision of DSHS-certified contact hours. Language was included in the proposed rules that curricula shall be provided by a certified instructor, unless otherwise approved by the department. DSHS is developing a procedure to implement criteria for a guest instructor, based on input from Advisory Committee members. Beverly MacCarty shared the draft procedure and requested feedback from Advisory Committee members.

**Draft procedure:**

- The training program (instructor of record) is responsible for ensuring the credentials and expertise of a guest instructor.
- *Requirements - Certification course*
  - Guest instructor meets at least two of the following qualifications:
    - Licensure or certification in field related to training topic, including certification as a CHW
    - Advanced degree (Master's or doctorate) in field related to training topic
    - Publication [peer-reviewed journal] or research related to training topic
    - Current work (agency/employer/supervisor) related to training topic
    - Other unique qualifications, such as a person with a unique life experience related to training topic (example – cancer survivor)
    - Guest speaker provides no more than 2 hours of training per core competency (no more than 10% of total curriculum).
- *Requirements - Continuing education course*
  - Guest instructor meets at least two of the following qualifications:
    - Licensure or certification in field related to training topic, including certification as a CHW
    - Advanced degree in field related to training topic
    - Publication [peer-reviewed journal] or research related to training topic
    - Current work (agency/employer/supervisor) related to training topic
    - Other unique qualifications, such as a person with a unique life experience related to training topic
    - Guest speaker provides no more than 25% of the course (no more than 1 hour per 4 hour course or 2 hours per 8 hour course).

*Questions* - Venus Ginés asked if the procedure could include language to allow some of the training available through DSHS to count as DSHS-certified contact hours, such as CERT training or include language for consideration on a case-by-case basis. *Next Step:* Provide time on the agenda at the May CHW Advisory Committee for additional review of the draft procedure.

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**Agenda topic Committee Business | Presenter Mérida Escobar, Presiding Officer**  
**None**

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**Agenda topic Committee Member Updates | Presenters Advisory Committee Members**  
**Discussion:**

**Bobby Hansford:** Mr. Hansford shared that he is honored and excited to be part of the Advisory Committee.

**Gary Eagleton:** The 9<sup>th</sup> Annual CHW Conference was held March 5, 2015 in Houston and brought together over 200 CHWs. He also noted that UTSPH-Houston will hold a CHW CE event on March 27<sup>th</sup>.

**Oscar Muñoz:** The Texas A&M Colonias Training Program Academy currently has CHW certification classes in El Paso, Laredo, and Brownsville. Mr. Muñoz also noted that a Memorandum of Understanding was being negotiated with Texas A&M Health Science Center to create service learning opportunities with nursing and pharmacy students doing work with promotores in the Laredo and the Eagle Pass area.

**Venus Ginés:** Dia de La Mujer Latina, Inc., (DML) will complete an Instructor certification course in March and is also in the middle of a CHW certification course. DML and South Texas Promotora Association (STPA) are co-sponsoring the fourth annual Expanding the Role of Promotores and CHWs in Promoting Prevention &

Dispelling Myths Conference, scheduled for May 17-18, 2015 in Austin. DML will offer scholarships. The event will culminate at the State Capitol where a proclamation will be announced for May 18 as Promotora Community Health Worker Day in Texas.

**Richard Rosing:** Houston Community College has a current CHW certification course and is planning an online CE event for CHW instructors, *Teaching in Today's World*, on April 24, 2015

**Mérida Escobar:** South Texas Promotora Association (STPA) recently held a conference with over 150 promotores and plans on holding this conference each year. STPA completed a CHW certification course on March 20, 2015 and is planning a CHW CE event in April, 2015.

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**Agenda topic New business | Presenter Mérida Escobar, Presiding Officer**

**Discussion: New business for consideration at next meeting – May 29, 2015**

- STPA Teen Video
- Open Meetings/Open Records
- Draft procedure – Guest Instructor

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**Meeting Adjourned**

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